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HIGHLIGHTS:

Winter Wheat Seedings
Late Season Crops & Hay Stocks
Grain Stocks
Ag Prices Received
Pulse Crops Production
Oilseeds Crop Production

Winter Wheat Seedings

Montana producers seeded 1.85 million acres of winter wheat last fall for the 2004 crop year, up 50,000 acres or 3 percent from the 2003 crop. This would be the largest planted acreage since 1996 when 2.15 million acres were seeded.

Winter wheat seeding last fall began slowly as producers were concerned about the lack of soil moisture. Winter wheat seeding was completed by October 19. Emergence reached 89% by the end of November compared with 95% for last year. Winter wheat conditions at the end of December were rated at 8% very poor, 15% poor, 43% fair, 33% good, and 1% excellent compared with 1% very poor, 25% poor, 55% fair, 18% good, 1% excellent, respectively a year ago. The snowfall received during December has provided good snow cover and was rated 36% excellent, 38% good, 19% fair, 6% poor, and 1% very poor.

U.S. winter wheat planted area for harvest in 2004 is estimated at 43.5 million acres. This is down 3 percent from 2003. Seeding began last August and advanced ahead of the 5-year average pace throughout the fall. Nearly all of the U.S. acreage was seeded by December 1.

Hard red winter (HRW) wheat seeded area in the United States is about 31.0 million acres, down 4 percent from 2003.

Soft Red Winter (SRW) area, at about 8.3 million acres, is up slightly from last year while white winter wheat seeded area totals about 4.2 million acres, down 7 percent from 2003.

2003 Late Season Crops Summary

Montana producers planted 65,000 acres of corn in 2003, unchanged from 2002. Acres harvested for grain were 17,000 acres, 4,000 acres more than in 2002. The average yield was 140.0 bushels per acre, identical to last year. Grain production increased 560,000 bushels from a year ago to 2.380 million bushels due to an increase in acres harvested. The number of acres harvested for corn silage decreased 2,000 acres from 2002 to 47,000 acres. Corn silage yield averaged a record

high 24 tons per acre, 2 tons higher than a year ago.

Sugar beet producers in Montana planted 51,700 acres in 2003, down 6,300 acres from last year. Harvested acreage amounted to 51,500 acres, down 4,400 acres from 2002. Yield increased 5.8 tons from last year to average 25.4 tons per acre. Total production of 1.308 million tons, was up 19 percent from the previous year. **Fall potato** production in Montana totaled 3.339 million cwt., up 4 percent from last year. Producers harvested 10,600 acres compared with 10,400 in 2002. Potato yields increased 5 cwt. from a year ago to 315 cwt. per acre.

All hay harvested in Montana was down 150,000 acres from last year, to 2.45 million acres. All hay production was 4.635 million tons, up slightly from a year ago due to increases in alfalfa acreage and other hay yield. **Alfalfa hay** harvested acreage was 1.60 million, up 200,000 acres from last season. The average yield was 2.1 tons per acre, which is unchanged from the previous year. **Other hay** harvested acreage was 850,000, down 350,000 acres from the previous year. The decrease was mainly due to a reduction in the amount of CRP acreage hayed. The average yield was 1.5 tons per acre, compared with 1.4 tons per acre last year. **Montana hay stocks** were estimated at 3.986 million tons on December 1, down 1 percent from last year. Montana hay producers **seeded** an estimated 120,000 acres of alfalfa and alfalfa mixtures during 2003, which is equal to last year's seedings. New seedings include those mixed with a nurse crop, other forage, or direct seedings.

U.S. corn for grain production is estimated at 10.1 billion bushels, down 2 percent from the November forecast but up 12 percent from the 9.01 billion bushels produced in 2002. The average U.S. grain yield is estimated at 142.2 bushels per acre, 1.0 bushel below the November forecast but up 12.2 bushels from 2002. Both production and yield estimates are the largest on record. **Corn silage** production for the U.S. is estimated at 106 million tons, 1 percent above the 2002 level.

U.S. sugar beets production is estimated at 30.6 million tons, slightly below the November 1 forecast but 10 percent above last year's production. **Fall potatoes** production in the United States for 2003 is estimated at 411 million cwt., down less than 1 percent from the December forecast and 1 percent below last year. Area harvested, at 1.09 million acres, is down 2 percent from last year but 2 percent above two years ago. The average yield is estimated at 377 cwt per acre, 4 cwt above last year.

U.S. all hay production for 2003 is estimated at 157 million tons, down 2 percent from the October 1 forecast but up 4 percent from the 2002 total. **Alfalfa and alfalfa mixtures** production in 2003 totaled 76.3 million tons. All **other hay** production in 2003 totaled 80.8 million tons. Growers seeded 3.12 million acres of alfalfa and alfalfa mixtures during 2003. **U.S. stocks of all hay** stored on farms totaled 111 million tons on December 1, 2003, up 7 percent from 2002.

2003 Oilseeds Summary

Montana's **flaxseed** production for 2003 was 221,000 bushels, 26,000 bushels higher than last year's figure. Planted and harvested acreages were both 17,000, compared to 2002, when growers planted 17,000 acres and harvested 15,000. The average yield for 2003 was 13.0 bushels per acre, unchanged from the previous year.

Production of **mustard seed** in Montana during 2003 was 12.3 million pounds compared with 11.0 million in 2002. Planted acres of mustard amounted to 20,500 acres with 20,200 acres harvested. During 2002, Montana producers planted 27,000 acres of mustard seed and harvested 25,000 acres. Mustard seed yields averaged 610 pounds per acre this year, which is 170 pounds per acre more than 2002.

Montana **canola** growers planted 28,000 acres in 2003, 9,500 acres less than 2002. Harvested acreage was 27,000 acre, down 7,500 acres from last year. The 2003 canola yield was 940 pounds per acre, up 80 pounds per acre from last year.

Growers produced 32.34 million pounds of **safflower** in Montana during 2003. Safflower plantings in Montana totaled 42,500 acres with 42,000 acres harvested. Yield was 770 pounds per acre, down 30 pounds per acre from last year. The 2002 safflower crop produced 30.4 million pounds from 39,500 planted and 38,000 harvested acres.

Montana's 2003 all **sunflower** production was 915,000 pounds, compared with 928,000 pounds produced in 2002. Producers in the state planted 2,600 acres and harvested 1,200 acres in 2003, compared to 2002 when planted acreage was 1,700 and harvested was 1,600. The average yield is 763 pounds per acre, compared to 580 pounds per acres in 2002. (Continued on back page)

December 1, 2003 Grain Stocks

Stocks of **all wheat** in Montana on December 1, 2003 were 120.3 million bushels, up 7 percent from December 1, 2002. All wheat stocks stored on the farm amounted to 94.0 million bushels, up 8 percent from a year ago. All wheat stored off-farm amounted 26.3 million bushels, up 3 percent from a year ago. All wheat disappearance for the September - November 2003 quarter was up 20 percent from the same quarter last year to 32.2 million bushels, compared with 26.8 million a year ago.

Barley stocks in all positions on December 1, 2003 were 26.1 million bushels, down 10 percent from a year ago. Barley stored on-farms was 18.0 million bushels, down 18 percent from last year. Off-farm storage of barley was up 16 percent from a year ago at 8.1 million bushels. All barley disappearance for the September - November 2003 quarter was 9.1 million bushels, down 22 percent from a year ago. Oats stocks in all positions were estimated at 1.81 million bushels, down 14 percent from last year. On-farm stocks of oats were 1.7 million bushels down 15 percent from 2.0 million stored a year ago. Oats stored off-farm was down 4 percent from last year to 110,000 bushels.

The on-farm **storage capacity** of all storage facilities in Montana, normally used for storing grain, was estimated to be 330 million bushels, unchanged from a year ago. There were 167 off-farm storage

facilities in Montana on December 1, 2003. The storage capacity of off farm facilities was 68.8 million bushels, down 1 percent from a year ago.

U.S. all wheat stored in all positions on December 1, 2003 totaled 1.52 billion bushels, up 15 percent from a year ago. On-farm stocks are estimated at 492 million bushels, up 28 percent from last year. Off-farm stocks, at 1.03 billion bushels, are up 10 percent from a year ago. The indicated September - November 2003 disappearance is 518 million bushels, up 20 percent from the same period a year earlier.

Durum wheat stocks in all positions on December 1, 2003 for the U.S. totaled 67.0 million bushels, down 13 percent from a year ago. On-farm stocks, at 41.4 million bushels, are down 19 percent from last year. Off-farm stocks totaled 25.6 million bushels, down 1 percent from a year ago. The indicated September - November 2003 disappearance of 20.3 million bushels is up 26 percent from the same period a year earlier.

U.S. **barley** stocks in all positions on December 1, 2003 totaled 198 million bushels, up 16 percent from December 1, 2002. On-farm stocks are estimated at 97.2 million bushels, 17 percent above a year ago. Off-farm stocks, at 101 million bushels, are 16 percent above December 2002. Indicated disappearance during the September - November 2003 quarter totaled 43.7 million bushels, down 19 percent from the same period a year earlier.

Oats stored in all positions on December 1, 2003 in the U.S. totaled 119 million bushels, 15 percent above the stocks on December 1, 2002. Of the total stocks on hand, 64.3 million bushels are stored on farms, 22 percent more than a year ago. Off-farm stocks totaled 54.9 million bushels, 7 percent above a year earlier. Indicated disappearance during September - November 2003 totaled 12.5 million bushels, up 58 percent from the same period a year ago.

U.S. **corn** stocks in all positions on December 1, 2003 totaled 7.94 billion bushels, up 4 percent from December 1, 2002. Of the total stocks, 5.29 billion bushels are stored on farms, up 10 percent from a year earlier. Off-farm stocks, at 2.66 billion bushels, are down 6 percent from the previous year. The September - November 2003 indicated disappearance is 3.26 billion bushels, compared with 2.97 billion bushels during the same period last year.

The United States on-farm **storage capacity** totaled 11.0 billion bushels on December 1, 2003, down 1 percent from December 1, 2002. Iowa continues to lead all States in on-farm storage capacity with 1.65 billion bushels, followed by Illinois and Minnesota with 1.20 billion bushels each; Nebraska, 960 million bushels; and North Dakota with 710 million bushels. The top five States account for 52 percent of the Nation's on-farm storage capacity. On-farm grain storage capacity includes all bins, cribs, sheds, and other structures normally used to store whole grains or oilseeds located on farms.

December 1 Grain Stocks

GRAIN and POSITION	MONTANA				UNITED STATES		
	Dec. 1, 2002	Sept. 1, 2003*	Dec. 1, 2003	'03/'02	Dec. 1, 2002	Sept. 1, 2003*	Dec. 1, 2003
	Thousand Bushels		Percent		Thousand Bushels		
ALL WHEAT							
On Farms	87,000	126,000	94,000	108%	384,800	687,320	491,925
Off Farms 1/	25,440	26,470	26,310	103%	935,069	1,351,652	1,029,159
TOTAL	112,440	152,470	120,310	107%	1,319,869	2,038,972	1,521,084
DURUM WHEAT							
On Farms	--	--	--	--	50,800	58,000	41,400
Off Farms 1/	--	--	--	--	25,917	29,241	25,569
TOTAL	--	--	--	--	76,717	87,241	66,969
BARLEY							
On Farms	22,000	28,000	18,000	82%	83,400	141,900	97,200
Off Farms 1/	6,990	7,230	8,090	116%	86,601	99,730	100,684
TOTAL	28,990	35,230	26,090	90%	170,001	241,630	197,884
OATS							
On Farms	2,000	2,200	1,700	85%	52,500	82,100	64,300
Off Farms 1/	115	60	110	96%	51,284	49,637	54,918
TOTAL	2,115	2,260	1,810	86%	103,784	131,737	119,218
CORN							
On Farms	--	--	--	--	4,800,000	484,900	5,286,000
Off Farms 1/	--	--	--	--	2,837,971	601,773	2,658,779
TOTAL	--	--	--	--	7,637,971	1,086,673	7,944,779

1/ Terminals, mills, interior elevators. * Revised.

Agricultural Prices Received for November 2003

November full month crop prices were mixed compared with October 2003. Montana's winter wheat average price was \$3.65 per bushel, up \$0.10 from the previous month; spring wheat moved up \$0.23 to \$3.83 per bushel; but durum wheat prices dropped \$0.06 to \$3.94 per bushel. Feed barley prices increased \$0.09 from the previous month to \$2.16, but malt barley prices decreased \$0.25 to \$2.97 per bushel.

The mid-December price for alfalfa hay was up \$1.00 to \$77.00 per ton, but all other hay dropped \$1.00 to \$68.00 per ton. The mid-December grain prices were mostly lower than the previous month with winter wheat price averaging \$3.60 per bushel, spring wheat was \$3.75 per bushel, durum wheat was \$3.88 per bushel, feed barley was \$2.13 per bushel and malt barley averaged \$3.63 per bushel.

Livestock prices for the full month of November were mostly higher than the previous month. Steer and heifer prices jumped \$2.30 to \$98.50 per cwt, while cows rose \$0.20 to \$49.80. The average

price for calves increased \$3.00 to \$110.00 per cwt. Sheep prices rose \$7.00 to \$42.70 per cwt and lamb prices jumped \$10.00 to \$116.00 per cwt. Milk prices dropped \$0.20 per cwt from last month to \$14.70 per cwt. Steer and heifer prices for mid-December averaged \$99.20 per cwt.; cows averaged \$51.40 per cwt.; calves averaged \$114.00 per cwt.; and milk prices averaged \$14.60 per cwt.

Nationally, prices for November and changes from October were as follows: winter wheat was \$3.55, up \$0.18, spring wheat was \$3.67, up \$0.13; durum wheat was \$3.91, up \$0.01; the all barley price was \$2.41, down \$0.36, and steer and heifer prices were \$100.00, up \$2.20 per cwt.

The U.S. mid-December winter wheat price was \$3.62 per bushel, spring wheat was \$3.63 per bushel, durum wheat was \$3.84 per bushel, all wheat was \$3.63 per bushel, malt barley was \$2.79 per bushel, feed barley was \$1.99 per bushel, and all barley was \$2.41. Steer and heifer prices were \$98.60 per cwt, cow prices were \$49.90, calves were \$113.00 per cwt., all hog prices were \$34.90 per cwt, and all

egg prices were \$0.739 per dozen.

The preliminary All Farm Products Index of Prices Received by Farmers in November is 117, based on 1990-92=100, 4 points (3.5 percent) above the October Index. Both the Livestock and Products Index and the All Crops Index were higher in November. Producers received higher commodity prices for cattle, corn, soybeans, and wheat. Lower prices were received for cotton, hogs, and milk. The seasonal change in the mix of commodities farmers sell, based on the past 3-year average, also affects the overall index. Increased average marketings of all milk, cotton, cattle, and cottonseed offset decreased marketings of peanuts, soybeans, sunflowers, and potatoes.

This preliminary All Farm Products Index is up 20 points (20.6 percent) from November 2002. The Food Commodities Index increased 5 points (4.3 percent) above last month to 121, and is 25 points (26.0 percent) above November 2002. This index value is the highest since records began in 1975.

United States Index Summary

INDEX (1990-92=100)	November 2002	December 2002	November 2003	December 2003
Prices Received	97	100	117	115
Prices Paid, Interest, Taxes, & Farm Wage Rates 1/ Ratio 2/	125	125	130	130
	78	80	90	88

1/ Prices paid indexes (1990-92=100) published monthly. 2/ Ratio of index of prices received by farmers to index of prices paid.

Montana Average Farm Prices Received

Commodity	UNIT	Monthly Average				Change From Previous		Mid-Month Average	
		Montana		U.S.		Month	Year	Montana	U.S.
		Nov. 2002	Oct. 2003	Nov. 2003	Nov. 2003	Oct. 2003	Nov. 2002	Dec. 15, 2003	Dec. 15, 2003
		Dollars							
Winter Wheat	Bu.	4.28	3.55	3.65	3.55	+0.10	-0.63	3.60	3.62
Durum Wheat	Bu.	5.04	4.00	3.94	3.91	-0.06	-1.10	3.88	3.84
Spring Wheat	Bu.	4.48	3.60	3.83	3.67	+0.23	-0.65	3.75	3.63
All Wheat	Bu.	4.49	3.61	3.77	3.59	+0.16	-0.72	3.70	3.63
Barley, All	Bu.	2.79	2.68	2.57	2.86	-0.11	-0.22	2.90	2.41
Feed Barley	Bu.	2.23	2.07	2.16	2.44	+0.09	-0.07	2.13	1.99
Malt Barley	Bu.	3.09	3.22	2.97	3.11	-0.25	-0.12	3.63	2.79
Oats	Bu.	1.85	N/A	N/A	1.32	0	0	N/A	1.36
Alfalfa Hay	Ton	83.00	77.00	76.00	88.00	-1.00	-7.00	77.00	87.90
All Other Hay	Ton	75.00	71.00	69.00	64.90	-2.00	-6.00	68.00	66.90
All Hay Baled	Ton	82.00	75.00	74.00	80.70	-1.00	-8.00	76.00	81.30
Steers & Heifers	Cwt	81.00	96.20	98.50	100.00	+2.30	+17.50	99.20	98.60
Cows	Cwt	33.20	49.60	49.80	47.80	+0.20	+16.60	51.40	49.90
Beef Cattle 1/ Calves	Cwt	73.40	90.60	88.80	93.70	-1.80	+15.40	85.80	92.70
Sheep 2/ Lambs 2/ All Milk	Cwt	87.40	107.00	110.00	112.00	+3.00	+22.60	114.00	113.00
	Cwt	30.90	35.70	42.70	40.10	+7.00	+11.80	N/A	N/A
	Cwt	88.80	106.00	116.00	99.20	+10.00	+27.20	N/A	N/A
	Cwt	11.40	14.90	14.70	14.50	-0.20	+3.30	14.60	13.70

1/ Composite of steers, heifers, and cows. 2/ Mid-month prices for sheep and lambs discontinued January 1996.

2003 Oilseed Summary (continued)

U.S. production of **flaxseed** in 2003 totaled 10.4 million bushels, down 17 percent from the previous year. Yield is estimated at 17.9 bushels, unchanged from 2002.

U.S. **safflower** production in 2003 totaled 272.6 million pounds, down 9 percent from the previous year. Yield is estimated at 1,286 pounds, down 234 pounds from 2002. U.S. production of **mustard seed** in 2003 totaled 77.4 million pounds, down 37 percent from 2002. Yield is estimated at 723 pounds, up 18 pounds from the previous year.

U.S. **canola** production in 2003 is 1.51 billion pounds, down 3 percent from 2002. The canola yield, at 1,416 pounds, is up 198 pounds from last year.

The 2003 **sunflower** production totaled 2.67 billion pounds, 7 percent above the 2002 production but down 22 percent from 2001. The estimated yield per acre, at 1,213 pounds, increased 71 pounds from 2002.

2003 Pulse Crops Summary

Montana's **dry bean** growers produced 233,000 cwt. in 2003, down 35 percent from 2002. Producers planted 13,000 acres of beans this year, down 52 percent from last year, driven mostly by a significant reduction in garbanzo bean acreage. Growers harvested 12,800 acres, which yielded 1,820 lbs. per acre, compared with last year's 23,000 acres harvested and the average yield of 1,570 lbs.

per acre. **Pinto bean** production in 2003 was 209,000 cwt., which is 27 percent less than last year. Planted acreage was 9,700, down 3,800 acres from last year. Harvested acreage, at 9,700 acres, is 25 percent below the previous year. The yield was 2,150 lbs. per acre, which is 70 pounds less than last year. **Garbanzo beans** production, at 22,000 cwt., is 69 percent lower than last year due to decreased acreage. Planted acreage was 3,200, down from 12,700 acres last year. Harvested area was 3,000 acres, down 6,600 acres from last year. Because of the continued drought, many producers had to abandon their acreage or chose to graze or hay their fields. The yield was 730 pounds per acre, down from last year's 740 pounds per acre. **Small garbanzo beans** producers planted 2,100 acres, of which 2,000 were harvested with a yield of 900 lbs. per acre. Total production was 18,000 cwt. for 2003. **Large garbanzo beans** producers planted 1,100 acres, of which 1,000 were harvested with a yield of 400 lbs. per acre. Total production of large garbanzo beans was 4,000 cwt.

Dry edible pea production for 2003 in Montana was 450,000 cwt., up 245,000 cwt. from 2002. Planted and harvested acreage was 33,000 and 31,000 acres, respectively. In 2002, growers planted 32,000 acres and harvested 27,000. Average yield for 2003 was 14.5 cwt. per acre, compared with 7.6 cwt. last year. **Austrian winter pea** production in 2003 was 56,000 cwt., which is 36,000 cwt. higher than last year's figure. Planted acreage was 9,500, unchanged from 2002 acreage.

Harvested acreage, at 7,000, was double the previous year. The yield was 8.0 cwt. per acre in 2003, compared with 5.8 cwt. in 2002. Producers used fewer acres for forage and hay in 2003.

Montana's 2003 production of **lentils** was 273,000 cwt., up 83 percent from a year ago. Additional harvested area combined with favorable yields in the largest lentil producing counties in the State. Planted area was 30,000 acres and harvested acres were 26,000 acres. In 2002, the planted and harvested acres were 25,000 and 21,000, respectively. The average yield was 10.5 cwt. per acre in 2003, compared with 7.1 cwt. in 2002.

U.S. **dry edible bean** production is estimated at 22.5 million cwt. for 2003, down 1 percent from the December forecast and 25 percent below last year.

Production of **dry edible peas** in Idaho, Montana, North Dakota, Oregon, and Washington is estimated at 5.20 million cwt. for 2003, up 4 percent from the November 1 forecast and 23 percent above 2002. Production of **Austrian winter peas** in Idaho, Montana, and Oregon for the 2003 season is estimated at 174,000 cwt., up 21 percent from the November 1 forecast and 6 percent above 2002.

Production of **lentils** in Idaho, Montana, North Dakota, and Washington is estimated at 2.44 million cwt. for 2003, up 7 percent from the November 1 forecast but 3 percent below 2002.

COMING IN NEXT REPORTER

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